



Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
 Post Office Box 50130  
 Charleston, WV 25305-0130

# State of West Virginia Master Agreement

Order Date: 07-01-2025

CORRECT ORDER NUMBER MUST  
 APPEAR ON ALL PACKAGES, INVOICES,  
 AND SHIPPING PAPERS. QUESTIONS  
 CONCERNING THIS ORDER SHOULD BE  
 DIRECTED TO THE DEPARTMENT  
 CONTACT.

<b>Order Number:</b>	CMA 0201 0201 SEC2300000001 5	<b>Procurement Folder:</b>	1040362
<b>Document Name:</b>	INDEPENDENT FINANCIAL ADVISORY SERVICES	<b>Reason for Modification:</b>	Change Order No.4 - issued to renew the original contract.
<b>Document Description:</b>	INDEPENDENT FINANCIAL ADVISORY SERVICES		
<b>Procurement Type:</b>	Central Master Agreement		
<b>Buyer Name:</b>			
<b>Telephone:</b>			
<b>Email:</b>			
<b>Shipping Method:</b>	Best Way	<b>Effective Start Date:</b>	2022-07-09
<b>Free on Board:</b>	FOB Dest, Freight Prepaid	<b>Effective End Date:</b>	2026-07-08

VENDOR		DEPARTMENT CONTACT			
<b>Vendor Customer Code:</b>	000000104138	<b>Requestor Name:</b>	Joyce K Jones		
PUBLIC RESOURCES ADVISORY GROUP INC 39 BROADWAY STE 1210		<b>Requestor Phone:</b>	(304) 558-4331		
NEW YORK NY 10006		<b>Requestor Email:</b>	joyce.k.jones@wv.gov		
US		<div style="font-size: 48px; font-weight: bold;">2026</div> <div style="font-weight: bold;">FILE LOCATION _____</div>			
<b>Vendor Contact Phone:</b>	212-566-7800			<b>Extension:</b>	
<b>Discount Details:</b>					
	<b>Discount Allowed</b>	<b>Discount Percentage</b>	<b>Discount Days</b>		
#1	No	0.0000	0		
#2	No				
#3	No				
#4	No				

INVOICE TO	SHIP TO
ACCOUNTING SECTION DEPARTMENT OF ADMINISTRATION 2019 WASHINGTON ST E PO BOX 50121 CHARLESTON WV 25305-0121 US	DEPARTMENT OF ADMINISTRATION OFFICE OF THE SECRETARY 1900 KANAWHA BLVD E, BLDG 1 RM E119 CHARLESTON WV 25305-0120 US

*CR 7-2-25*  
 Purchasing Division's File Copy

<b>Total Order Amount:</b>	Open End
----------------------------	----------

*JA 7/1/25*  
**PURCHASING DIVISION AUTHORIZATION**  
 DATE: *Tuafie 7/1/25*  
 ELECTRONIC SIGNATURE ON FILE

**ATTORNEY GENERAL APPROVAL AS TO FORM**  
 DATE: *7/8/25*  
 ELECTRONIC SIGNATURE ON FILE

**ENCUMBRANCE CERTIFICATION**  
 DATE: *7-8-25*  
 ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

Change Order No. 04 is issued to renew the original contract according to all terms, conditions, prices, and specifications contained in the original contract, including all authorized change orders.

Effective date of renewal: 07/09/2025 through 07/08/2026

Renewal Remaining: (1) year

No other changes.

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
1	80101603			LS	0.000000
	<b>Service From</b>	<b>Service To</b>		<b>Service Contract Amount</b>	
				0.00	

**Commodity Line Description:** INDEPENDENT FINANCIAL ADVISORY SERVICES

**Extended Description:**



STATE OF WEST VIRGINIA  
DEPARTMENT OF ADMINISTRATION

Eric L. Householder  
CABINET SECRETARY

June 24, 2025

Thomas Huestis  
Public Resources Advisory Group  
39 Broadway, Suite 1210  
New York, NY 10006

Re: Renewal of Contract CMA 0201 SEC2300000001

Dear Mr. Huestis:

Please allow this letter to serve as a renewal of the contract for CMA 0201 SEC2300000001 – Independent Financial Advisory Service. The State of West Virginia hereby exercises its right of renewal according to the same terms, conditions, specifications, and pricing contained in the original contract including all authorized change orders.

The renewal shall run for a period of up to one (1) year effective July 9, 2025 through July 8, 2026. If you agree to this renewal, please sign below and return to my attention.

A Purchasing Affidavit is attached for your execution. Additionally, please provide a copy of the current Certificate of Liability Insurance for Public Resources Advisory Group.

Very truly yours,

Robert P. Paulson  
General Counsel  
WV Department of Administration

Accepted by:

Senior Managing Director for Public Resources Advisory Group, Inc.

cc: Samantha Willis, WV Purchasing Division  
1900 KANAWHA BOULEVARD, EAST • BUILDING 1, ROOM E-119 • CHARLESTON, WEST VIRGINIA 25305-0120 • (304) 558-4331 • FAX: (304) 558-2999

You are viewing this page over a secure connection. [Click here for more information.](#)

## West Virginia Secretary of State — Online Data Services

### Business and Licensing

Online Data Services Help

### Business Organization Detail

*NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.*

### PUBLIC RESOURCES ADVISORY GROUP, INC.

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
C   Corporation	7/1/2005		7/1/2005	Foreign	Profit			

Organization Information		
<b>Business Purpose</b>	5416 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Management, Scientific and Technical Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)	
<b>Charter County</b>		<b>Control Number</b> 77341
<b>Charter State</b>	NY	<b>Excess Acres</b>
<b>At Will Term</b>		<b>Member Managed</b>
<b>At Will Term Years</b>		<b>Par Value</b>
<b>Authorized Shares</b>	<b>Young Entrepreneur</b>	Not Specified

## Addresses

Type	Address
<b>Local Office Address</b>	39 BROADWAY , SUITE 1210 NEW YORK, NY, 10006
<b>Mailing Address</b>	39 BROADWAY , SUITE 1210 NEW YORK, NY, 10006 USA
<b>Notice of Process Address</b>	COGENCY GLOBAL INC. 128 CAPITOL STREET CHARLESTON, WV, 25301
<b>Principal Office Address</b>	39 BROADWAY , SUITE 1210 NEW YORK, NY, 10006 USA
Type	Address

## Officers

Type	Name/Address
<b>Director</b>	EDMUND SOONG 11500 WEST OLYMPIC BOULEVARD SUITE 400 LOS ANGELES, CA, 90064
<b>Director</b>	THOMAS HUESTIS 39 BROADWAY, SUITE 1210 NEW YORK, NY, 10006
<b>President</b>	STEVE PEYSER 39 BROADWAY , SUITE 1210 NEW YORK, NY, 10006
<b>Secretary</b>	THOMAS HUESTIS 39 BROADWAY SUITE 1210 NEW YORK, NY, 10006
<b>Treasurer</b>	THOMAS HUESTIS 39 BROADWAY, SUITE 1210 NEW YORK, NY, 10006
Type	Name/Address

## Annual Reports

Filed For



2025
2024
2023
2022
2021
2020
2019
2018
2017x
2017
2016
2015
2014
2013
2012
2011
2010
2009
<b>Date filed</b>

For more information, please contact the Secretary of State's Office at 304-558-8000.

Wednesday, July 2, 2025 — 6:26 AM

© 2025 State of West Virginia






Home Search Data Bank Data Services Help

Search

All Words

e.g. 1606N020Q02

 Please Sign In: You must sign in to your SAM.gov account to search Entities, Responsibility/Qualification and the Disaster Response Registry.

[Sign In](#)


Filter By

Keyword Search

For more information on how to use our keyword search, visit our [help guide](#)

Simple Search

Search Editor

- Any Words 
- All Words 
- Exact Phrase 

e.g. 123456789, Smith Corp

"PUBLIC RESOURCES ADVISORY GROUP, INC." 

- Entity 
- Location 
- Status 
- Active
- Inactive

Reset 

Entity Information  < All Entity Information Entities Disaster Response Registry Responsibility / Q1 >

# No matches found

# COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: <u>JA</u> Date: <u>6/30/25</u>  Solicitation No. <u>CO no. 4 - Renew</u>	Agency: Dept. of Admin - Office of the Cabinet Secretary  Procurement Officer Submitting Requisition: LeAnne Neccuzi  Requisition No. CMA SEC2500000001 C.O. 4 - Renewal  PF No.: 1040362
--	---

This checklist **MUST** be completed by a state agency's designated procurement officer and submitted with the Purchase Requisition to the Purchasing Division. The purpose of the checklist is to verify that an agency procurement officer has obtained and included required documentation necessary for the Purchasing Division to process the requisition without future processing disruptions. At the agency's preference, the agency **MUST** either submit the checklist by attaching it to the requisition's Header **OR** by placing it in the requisition's Procurement Folder.

## FOR ALL SOLICITATION TYPES:

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
1	Specifications and Pricing Page included	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Use of correct specification template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Use of correct requisition type [CRQS → CCT or CPO] or [CRQM → CMA]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Use of most current terms and conditions <a href="http://www.state.wv.us/admin/purchase/TCP.pdf">www.state.wv.us/admin/purchase/TCP.pdf</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Maximum budgeted amount in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Suggested vendors in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Capitol Building Commission pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Financing (Governor's Office) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Fleet Management Division pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
<b>10</b>	Insurance requirements				
	Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Automobile Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Workers' Compensation/Employer's Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Cyber Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Builder's Risk/Installation Floater	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Professional Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>11</b>	Office of Technology CIO pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>12</b>	Treasurer's Office (banking) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**FOR CHANGE ORDERS/RENEWALS:**

<b>1</b>	Two-party agreement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>2</b>	Standard change order language	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>3</b>	Office of Technology CIO approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> N/A
<b>4</b>	Justification for price increases/backdating/other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> N/A
<b>5</b>	Bond Rider (Construction)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> N/A
<b>6</b>	Secretary of State Verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>7</b>	State debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>8</b>	Federal debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

*\*The items pre-checked are required before a Purchase Requisition may be submitted to the Purchasing Division. Failure to complete and verify this documentation may result in rejection of the requisition back to the agency. It is up to the agency procurement officer to determine if pre-approvals, insurance, or other documentation is needed for the purchase. The referenced information below may be used to make this determination.*

*For Purchasing Division Use Only:*

I have reviewed the requisition identified above and find that it is sufficient to advertise publicly to the vendor community. My review does not preclude the possibility that the vendor community, or some other entity, will identify an area of concern; however, should such issues or concerns arise, they will be reviewed and addressed as may be appropriate.

Signature: \_\_\_\_\_

